#### SUMMARY OF THE HOURLY TASK GUIDELINES WORKGROUP

Organizer: CDSS Adult Programs, Quality Assurance Bureau

Location: Health & Human Services Data Center, 9323 Tech Center Drive,

Conference Room 2, Sacramento, California

Date: November 3, 2005 Time: 10:00 a.m. to 1:00 p.m.

The meeting was attended by consumers, providers, various state and county staff, advocacy groups, public authority representatives, and union representatives in person and via teleconference. Attendees signed in and received the following handouts: Agenda; Interquartiles by Functional Rank chart; draft regulations Division 30-757; and Hourly Task Guidelines Task Tools.

Brian Koepp, Chief, Quality Assurance Bureau (QAB), commenced the meeting by welcoming attendees and introducing Bob Sertich, Chief Deputy Director, CDSS, who thanked the members of the workgroup for all the work they have done on this workgroup. He advised the workgroup that the goal remains to implement hourly task guideline regulations by June 30, 2006. The next step after today's meeting is to develop the field test protocol using the data sets of the Interquartile ranks and Task Tolls and field test the protocol in January 2006. This workgroup will have at least one more meeting after the field test to share the results. He reminded the attendees that regulations are still in draft and are open for comments and changes before being sent forward for the approval process. He also related that the social worker Phase One training materials will be available online on the CDSS website.

An attendee read a letter from a variety of groups (SEIU Local 434b; Herbert M. Myer, IHSS consumer; IHSS Public Authority of Marin; United Domestic Workers; California Association of Public Authorities; Home Care Council; Grey Panthers; OWL; Quality Home Care Coalition; Janey Whitford, IHSS consumer advocate; Protection & Advocacy, Inc. [PAI]) requesting the deadline for implementation of the regulations be extended. In a quote from the letter, the attendee stated "We appreciate that CDSS has made significant efforts toward a inclusive and productive stakeholders process. A great deal of work has been completed and many of the mandates contained in SB 1104 to develop a quality assurance initiative have been completed in accordance with statutory deadlines and with the concurrence of stakeholders. However, we have significant concerns in three areas, outlined below. The most complex, significant and potentially controversial piece pertaining to the development of Hourly Task Guidelines requires additional time and thought and we respectfully request that a more reasonable timeline to do justice to this effort which affects so many Californians." Eva Lopez, Chief of the Adult Programs Branch, and Brian responded to several of the concerns in the letter. One of the concerns of the groups is access to the Social Worker IHSS phase one training. Brian shared there will be a limited number of slots released to provide the Phase One social worker training to interested parties. It is expected that California State University, Sacramento will provide one Phase One training session in the south and one Phase One training session in the north.

Eva then acknowledged that there may be a difference of perception regarding what the field test will involve and requested attendees describe what they perceive the field testing will consist of. Brian shared that CWDA has volunteered to help with the process of developing the field test. The field test needs to measure the effectiveness of the hourly task ranges in the field for both social workers and consumers. CDSS has just begun to work with CWDA on the design of the field test. The plan is to do a field test in one county in each of the four CWDA regions. The field test will occur during the month of January 2006 with analysis of the data to occur in February 2006. A meeting will be scheduled in March 2006 to share the findings with the workgroup.

The attendees expressed their desire to have others involved from the workgroup on the design of the field test. Eva agreed that it is important to have input from the workgroup in the design. Brian suggested that the workgroup members select representatives from consumers, providers, and Public Authorities to participate with CDSS and CWDA in a subgroup to design the field test. There was a concern from the attendees about using existing data sets that are flawed in the field test. Eva reiterated that the purpose of the field test is to determine if the ranges meet the needs of consumers. The field test will show whether adjustments need to be made or not.

Brian then introduced Joan Boomer, CDSS QAB. Joan provided an overview of the Interquartiles by Functional Rank chart. She reviewed the definitions of the different ranks. The chart breaks down each task by rank 2, 3, 4, and 5, as well as providing a range for all cases. There was a discussion about using the range for all cases or using the range for each rank. The concern is if social workers the range by rank that it may result in the social worker needing to complete more paperwork for exceptions. It was explained that it was not being proposed that a new form would be developed for exceptions, but rather the social worker would document the reason for the exception in the case notes. After further discussion the consensus by the group was to use the Functional Rank Interquartiles Chart which reflected time per tasks by each rank. This information would be carried forward into the Hourly Task Guidelines field test process.

Joan then discussed the draft regulations. The draft regulations were written based on the Hourly Task Guidelines Task Tools document. She explained how to read the regulations for those who are not familiar with regulations. The strikeout words are to be removed and the underlined words are the new regulations. The draft regulations will be revised with the input of the workgroup. Workgroup members need to read the draft regulations and send their comments and suggestions in writing to Brian by close of business Thursday, November 10, 2005. The QAB will then write the reasons and authority for making changes in the regulations and submit them for approval via the regulation approval process. There will be an opportunity for public comment before the regulations are finalized.

Brian thanked the workgroup attendees for their hard work. They will be kept informed on the process of the field test and the regulations via the IHSS website. The workgroup was adjourned.

# Interquartiles by Functional Rank

Meal Preparation							
	Γ			Interq	uartile		
	Mean	Mode	Median	Low	High		
Rank 2	4.36	7.00	4.00	2.92	6.00		
Rank 3	5.18	7.00	5.25	3.50	7.00		
Rank 4	6.19	7.00	7.00	5.25	7.00		
Rank 5	6.78	7.00	7.00	7.00	7.00		
All Cases	6.21	7.00	7.00	5.25	7.00		

Meal Cleanup							
			Interq	uartile			
	Mean	Mode	Median	Low	High		
Rank 2	1.67	2.00	2.00	1.00	3.50		
Rank 3	2.56	5.00	3.50	1.67	3.50		
Rank 4	2.54	3.50	2.33	1.00	3.50		
Rank 5	2.68	3.50	2.50	2.33	3.50		
All Cases	2.64	3.50	2.50	1.75	3.50		

Feeding							
				Interq	uartile		
	Mean	Mode	Median	Low	High		
Rank 2	1.77	1.75	1.40	0.70	1.97		
Rank 3	2.57	1.75	1.75	1.17	3.50		
Rank 4	4.69	3.50	4.00	2.67	5.81		
Rank 5	6.61	7.00	5.25	3.50	7.00		
All Cases	3.36	1.75	2.33	1.40	5.00		

Bathing/Grooming							
				Interq	uartile		
	Mean	Mode	Median	Low	High		
Rank 2	1.12	1.00	1.00	0.50	1.50		
Rank 3	1.95	3.50	1.75	0.17	2.50		
Rank 4	3.24	3.50	2.75	1.79	3.50		
Rank 5	3.45	3.50	3.34	2.15	4.42		
All Cases	2.14	3.50	2.00	1.16	2.99		

Bed Baths						
				Interq	uartile	
	Mean	Mode	Median	Low	High	
Rank 2	1.27	1.00	0.50	0.50	1.75	
Rank 3	1.71	1.40	1.00	1.00	2.33	
Rank 4	2.25	2.00	3.50	1.16	3.50	
Rank 5	2.81	2.50	3.50	1.67	3.50	
All Cases	2.26	2.00	3.50	1.08	3.50	

Dressing								
				Interq	uartile			
	Mean	Mode	Median	Low	High			
Rank 2	0.86	0.58	0.70	0.56	1.17			
Rank 3	1.25	1.17	1.17	0.70	1.63			
Rank 4	1.97	2.33	1.75	1.17	2.33			
Rank 5	2.52	3.50	2.33	1.40	3.50			
All Cases	1.40	3.00	1.75	0.70	1.75			

- .1 Only those services specified in .11 though .19 of this Section below shall be authorized through IHSS. A person who is eligible for a personal care service provided pursuant to the PCSP shall not be eligible for that personal care service through IHSS. A service provided by IHSS shall be equal to the level of the same service provided by PCSP.
  - (a) For services in this Section where time guidelines are specified, the services shall be subject to the specified time guideline unless the consumer's needs requires an exception to the guideline. Time per task guidelines can be used only if appropriate in meeting the consumer's particular circumstances.
    - (1) In determining the amount of time per task, the consumer's ability to perform the tasks based on his/her Functional Index (FI) ranking shall be a contributing factor, but not the sole factor.
    - (2) An exception to the time guideline may result in receiving more or less time based on the consumer's need for the service.
    - (3) Exceptions to the maximum time per task guidelines identified in this Section shall be made when necessary to enable the consumer to establish and maintain an independent living arrangement and/or remain safely in his/her home or abode of his/her own choosing.
    - (4) No exception shall exceed the maximum limits of 195 hours per month as specified at Section 30-765.1 for Residual cases or 283 hours per month as specified at Section 30-780.2(b) for PCSP cases.
    - (5) No exceptions to time per task guidelines shall be made due to inefficiency or incompetence of the provider.
    - (6) When an exception to a time per task guideline is made in a consumer's case, the reason for the exception shall be documented in the case file.

#### HANDBOOK BEGINS HERE

- (A) Documentation of the reason for the exception will provide necessary data to audit the effectiveness of each guideline in terms of:
  - (1) Achieving equity in service authorizations; and
  - (2) Evaluating programs costs.

#### HANDBOOK ENDS HERE

#### SERVICE PROGRAM NO. 7: IN-HOME SUPPORT SERVICES

- .11 Domestic services which are limited to the following:
  - (a) Sweeping, vacuuming, washing and waxing of floor surfaces.
  - (b) Washing kitchen counters and sinks.
  - (c) Cleaning the bathroom.
  - (d) Storing food and supplies.
  - (e) Taking out garbage.
  - (f) Dusting and picking up.
  - (g) Cleaning oven and stove.
  - (h) Cleaning and defrosting refrigerator.
  - (i) Bringing in fuel for heating or cooking purposes from a fuel bin in the yard.
  - (j) Changing bed linen.
  - (k) Miscellaneous domestic services (e.g., changing light bulbs) when the service is identified and documented by the caseworker as necessary for the recipient to remain safely in his/her home.
    - .111 The time guideline for "domestic services" shall not exceed 6.0 hours total per month per household unless the consumer's needs require an exception.
- .12 (continued)
- .13 Related services are limited to:
  - .131 Preparation of meals, which includes such tasks as planning menus; removing food from the refrigerator or pantry; washing/drying hands before and after meal preparation; washing, peeling and slicing vegetables; opening packages, cans, and bags; measuring and mixing ingredients; lifting pots and pans; trimming meat, reheating food; cooking and safely operating the stove; setting the table, serving the meals, and cutting the food into bite-size pieces.
    - (a) The time guideline range for "preparation of meals" shall between .....and ......hours per week unless the consumer's needs require an exception.
    - (b) Factors for consideration of time include, but are not limited to:
      - (1) The extent to which the consumer can assist or perform tasks safely.
      - (2) The types of food the consumer usually eats for breakfast, lunch, dinner, and snacks.

- (3) If the consumer would prefer to eat other types of meals (i.e., more hot meals).
- (4) The types of food the consumer eats on days the provider does not work, including any food prepared by the provider in advance for the consumer on days when the provider does not work.
- (5) The amount of time it usually takes the provider to prepare meals.
- (6) Time for universal precautions, as appropriate.
- (c) Exception criteria to provide more time than the time guideline range include, but are not limited to:
  - (1) If the consumer must have meals pureed or cut into bite-sized pieces.
  - (2) <u>If the consumer has special dietary requirements that require</u> longer preparation times or preparation of more frequent meals.
- .132 Meal clean-up, which includesing washing, rinsing, and drying dishes, pots, pans, and utensils, and culinary appliances; and putting them away: storing/putting away leftover foods/liquids; and washing/drying hands.
  - (a) Meal cleanup does not include cleaning the refrigerator, oven, or stove.

    These services are defined under "domestic services" specified in .11 of this Section.
  - (b) The time guideline range for "meal clean-up" shall between ......and ......hours per week unless the consumer's need requires an exception.
  - (c) Factors for consideration of time include, but are not limited to:
    - <u>The extent to which the consumer can assist or perform tasks safely.</u>

#### HANDBOOK BEGINS HERE

(A) For a consumer with an FI Score of Rank 4 in "preparation of meals" and "meal clean-up" who has been determined able to wash breakfast/lunch dishes and utensils and only needs the provider to clean-up after dinner, consideration of time would be based on the provider performing clean-up of the dinner meal only.

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- (2) The types of meals requiring the clean-up.
- (3) If the consumer can rinse the dishes and leave them in the sink until the provider can wash them.

#### HANDBOOK BEGINS HERE

(A) An consumer who eats only toast and coffee for breakfast would require less time for cleanup than a consumer who eats eggs and bacon.

#### HANBOOK ENDS HERE

- (3) The frequency per day that meal clean-up is necessary.
- (4) The frequency per week that meal clean-up is necessary and that the provider provides meal clean-up services.
- (5) If there is a dishwasher appliance available.
- (6) Time for universal precautions, as appropriate.
- (c) Exceptions to the time guideline range may include, but are not limited to:
  - (1) If the consumer must eat frequent meals which require additional time for preparation that requires more time for clean-up.
  - (2) If the consumer does not eat breakfast and eats his/her main meal at noon with a light meal for a snack at night that does not require meal clean-up, less time may be needed.
- .133 Planning of menus.
- .134 (continued)
- .135 Laundry services which includesing the tasks of washing and drying laundry, mending, ironing, folding, and storing clothes on shelves or in drawers.
  - (a) (continued)
  - (b) (continued)

#### SOCIAL SERVICES STANDARDS

Regulations

SERVICE PROGRAM NO. 7: IN-HOME SUPPORT SERVICES 30-757(Cont.)

#### 30-757 PROGRAM CONTENT SERVICE CATEGORIES AND TIME GUIDELINES 30-757

- (c) The time guideline for laundry service where laundry facilities are available in the home shall not exceed 1.0 hours total per week per household unless the consumer's need requires an exception to exceed this limit.
  - (1) Laundry facilities are available in the consumer's home if there is a washer and dryer in the consumer's home or apartment complex.

#### HANDBOOK BEGINS HERE

(A) In assessing time for in-home laundry services, it is expected that the provider will accomplish other tasks while clothes are washing and drying.

#### HANDBOOK ENDS HERE

(d) The time guideline for laundry services where laundry facilities are not available in the home shall not exceed 1.5 hours total per week per household unless the consumer's need requires and exception to exceed this limit.

#### HANDBOOK BEGINS HERE

(1) It is expected that the typical provider will use a local laundromat during nonpeak-hour times and will utilize as many machines simultaneously as necessary for efficient time utilization.

#### HANDBOOK ENDS HERE

- 136 <u>Food shopping which includes</u> Reasonable food shopping and other shopping/errands limited to the nearest available stores or other facilities consistent with the client's economy and needs.
  - (a) The county shall not authorize additional time for the recipient to accompany the provider.
  - (b <u>a</u>) Food shopping includes the tasks of making a grocery list, travel to/from the store, shopping, loading, unloading, and storing food.
    - (1) The time guideline for "food shopping" shall not exceed 1.0 hour total per week per household unless the consumer's need requires an exception to exceed this limit.

- (e <u>b</u>) Other shopping/errands includes the tasks of making a shopping list, travel to/from the store, shopping, loading, unloading, and storing supplies purchased, and/or performing reasonable errands such as delivering a delinquent payment to avert an imminent utility shut-off or picking up a prescription, etc.
  - (1) The time guideline for "other shopping/errands" shall not exceed 0.5 hour total per week per household unless the consumer's need requires an exception to exceed this limit.
- (c) The county shall not authorize additional time for the consumer to accompany the provider for grocery shopping or other shopping and errands.
- .14 Personal care services, limited to:
  - (a) Bowel and bladder care, such as assistance with enemas, emptying of catheter or ostomy bags, which includes assistance with using, emptying, and cleaning bed pans/bedside commodes, urinals, ostomy and/or catheter receptacles; application of diapers; positioning for diaper changes; managing clothing; changing rubber sheets disposable barrier pads; putting on/off disposable gloves; wiping and cleaning consumer; and assistance with getting on/ and off commode or toilet; and washing/drying consumer's and provider's hands.
    - (1) Bowel and bladder care does not include insertion of enemas, catheters, suppositories, digital stimulation as part of a bowel program, or colostomy irrigation. These tasks are assessed as "paramedical services" specified at .19 of this Section.
    - (2) The time guideline range for "bowel and bladder" services shall be between .....and.....hours per week unless the consumer's need requires an exception.
    - (3) Factors for consideration of time include, but are not limited to:
      - (A) The extent to which the consumer can assist or perform tasks safely.
      - (B) If the consumer has a condition which results in frequent urination and/or bowel movements.
      - (C) If there are assistive devices available which result in decreased need for assistance.

#### HANDBOOK BEGINS HERE

 Situations where elevated toilet seats and/or Hoyer lifts are available may result in less time needed for bowel and bladder services due to a decreased need for assistance by the consumer.

**30-757(Cont.)** 

#### HANDBOOK ENDS HERE

- (D) Time for universal precautions, as appropriate.
- (4) Exceptions to the time guideline range may include, but are not limited to:
  - (A) Frequent urination or bowel movements.
  - (B) Frequent bowel or bladder accidents.
  - (C) Occasional bowel or bladder accidents that require assistance from another person.
- (b) (continued)
- (c) Feeding, which includes assistance with Consumption of food and assurance of adequate fluid intake consisting of feeding or related assistance to consumers recipients who cannot feed themselves or who require assistance with special devices in order to feed themselves or to drink adequate liquids.
  - (1) Feeding tasks include assistance with reaching for, picking up, and grasping utensils; and washing/drying hands before and after feeding.
  - (2) Feeding tasks do not include cutting food into bit-sized pieces or pureeing food, as these tasks are assessed in "preparation of meals" services specified at .131 of this Section.
  - The time guideline range for "feeding" services shall be between .....and.....hours per week unless the consumer's need requires an exception.
  - (4) Factors for consideration of time include, but are not limited to:
    - (A) The extent to which the consumer can assist or perform tasks safely.

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- (B) The amount of time it takes the consumer to eat meals.
- (C) The type of food that will be consumed.
- (D) The frequency of meals/liquids.
- (E) Time for universal precautions, as appropriate.
- (5) Exceptions to the time guideline range may include, but are not limited to:
  - (A) The constant presence of the provider is required due to the danger of choking or other medical issues.
  - (B) If the consumer is mentally impaired and requires prompting and/or feeding.
  - (C) If the consumer requires frequent meals.
  - (D) If the consumer prefers to eat foods that he/she can manage without assistance.
  - (E) If the consumer must eat in bed.
  - (F) If food must be placed in the consumer's mouth in a special way due to difficulty swallowing or other reasons.
- (d) Routine bed baths, which includes cleaning basin or other materials used for bed baths and putting them away; obtaining water and supplies; washing, rinsing, and drying body; applying lotion; and washing/drying hands before and after bathing.
  - Bed baths do not include sponge baths, as this task is assessed in "bathing, oral hygeniene, and grooming" services specified at .14 (e) of this Section.
  - (2) The time guideline range for "bed baths" services shall be between .....and.....hours per week unless the consumer's need requires an exception.
  - (3) Factors for consideration of time include, but are not limited to:
    - (A) The extent to which the consumer can assist or perform tasks safely.

- (B) If the consumer is prevented from bathing in the tub/shower.
- (C) <u>If bed baths are needed in addition to baths in the tub/shower.</u>
- (D) Time for universal precautions, as appropriate.
- (4) Exceptions to the time guideline range may include, but are not limited to:
  - (A) If the consumer is confined to bed and sweats requiring frequent bed baths.
  - (B) <u>If the consumer is unable to assist in the bed-bath process.</u>
- (e) Bathing, oral hygiene and grooming, and oral hygeine:-
  - (1) Bathing includes cleaning the body in a tub, shower, or sponge bath; obtaining water/supplies and putting them away; turning on/off faucets and adjusting water temperature; assistance with getting in/out of tub or shower; assistance with reaching all parts of the body for washing, rinsing, drying and applying lotion, powder, deodorant; and washing/drying hands.
  - (2) Grooming includes hair combing/brushing; hair trimming when the consumer cannot get to the barber/salon; shampooing. applying conditioner, and drying hair; shaving; fingernail/toenail care when these services are not assessed as paramedical services for the consumer; and washing/drying hands.
  - (3) Oray hygiene includes applying toothpaste and brushing, teeth, dentures, flossing; and washing/drying hands.
  - (4) Bathing, grooming, and oral hygiene, does not include getting to/from the bathroom, as these tasks are assessed as mobility under "ambulation" services specified at .14 (k) of this Section.
  - (5) The time guideline range for "bathing, grooming, and oral hygiene" services shall be between ......and......hours per week unless the consumer's need requires an exception.

- (6) Factors for consideration of time include, but are not limited to:
  - (A) The extent to which the consumer can assist or perform tasks safely.
  - (B) The number of times the consumer may need to bath.
  - (C) If the consumer requires assistance in/out of tub/shower.
  - (D) If the consumer needs assistance with supplies.
  - (E) If the consumer requires assistance washing his/her body.
  - (F) If the provider must be present while the consumer bathes for the consumer's safety.
  - (G) If the consumer requires assistance, drying his/her body and/or, putting on lotion/powder after bathing.
  - (H) If the consumer showers in a wheelchair.
  - (I) Universal precautions, as appropriate.
- (7) Exceptions to the time guideline range may include, but are not limited to:
  - (A) If the provider's constant presence is required.
  - (B) If the weight of the consumer requires more or less time.
  - (C) If the consumer has spasticity or locked limbs.
  - (D) If a roll-in shower is available.
- (f) Dressing, which includes putting on/taking off, fastening/unfastening, buttoning/unbuttoning, zipping/unzipping, and tying/untying of garments and undergarments; changing soiled clothing; and bringing tools to the consumer to assist with independent dressing.
  - (1) The time guideline range for "dressing" services shall be between .....and.....hours per week unless the consumer's need requires an exception.

- (2) Factors for consideration of time include, but are not limited to:
  - (A) The extent to which the consumer can assist or perform tasks safely.
  - (B) The type of clothing/garments the consumer wears.
  - (C) If the consumer prefers other types of clothing/garments.
  - (D) The weather conditions.
  - (E) Universal precautions, as appropriate.
- (3) Exceptions to the time guideline range may include, but are not limited to:
  - (F) If the consumer frequently leaves his/her home.
  - (B) If the consumer soils clothing, requiring frequent changes of clothing.
  - (C) If the consumer has spasticity or locked limbs.
- (g) Rubbing of skin/repositioning, which includes rubbing skin to promote circulation; turning in bed and other types of repositioning; assistance on/and off seats and wheelchairs; into and out of vehicles; and range of motion exercises which shall be limited to the following:
  - (1) General supervision of exercises which have been taught to the recipient by a licensed therapist or other health care professional to restore mobility restricted because of injury, disuse or disease.
  - (2) Maintenance therapy when the specialized knowledge and judgment of a qualified therapist is not required and the exercises are consistent with the patient's capacity and tolerance.
    - (A) Such exercises shall include the carrying out of maintenance programs, i.e., the performance of the repetitive exercises required to maintain function, improve gait, maintain strength, or endurance; passive exercises to maintain range of motion in paralyzed extremities; and assistive walking.

- (3) The time guideline range for "rubbing skin/repositioning" services shall be between .....and.....hours per week unless the consumer's need requires an exception.
- (4) Factors for consideration of time include, but are not limited to:
  - (A) The extent to which the consumer can assist or perform tasks safely.
  - (B) Any repositioning required for completion of a task that is not specified in any other the service care category.
  - (C) If the consumer's movement is limited while in the seating position and/or in bed and the amount of time the consumer spends in the seating position and/or in bed.
  - (D) If the consumer has circulatory problems.
  - (E) Universal precautions, as appropriate.
- (5) Exceptions to the time guideline range may include, but are not limited to:
  - (A) If the consumer has a condition that makes him/her confined to bed.
  - (B) If the consumer has spasticity or locked limbs.
- (h) Moving into and out of bed, which includes assisting in transfer to/from a bed, chair, couch, wheelchair, walker, or other assistive device.
  - The time guideline range for "moving into and out of bed" services shall be between .....and.....hours per week unless the consumer's need requires an exception.
  - (2) Factors for consideration of time include, but are not limited to:
    - (A) The extent to which the consumer can assist or perform tasks safely.
    - (B) The amount of assistance required.
    - (C) The availability of equipment, such as a Hoyer lift.
    - (D) Universal precautions, as appropriate.

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- (3) Exceptions to the time guideline range may include, but are not limited to:
  - (A) <u>If the consumer gets in and out of bed frequently during the day</u> or night due to naps or use of the bathroom.
  - (B) If the weight of the consumer and/or condition of his/her bones requires more careful, slow transfers.
  - (C) If the consumer has spasticity or locked limbs.
- (i) Care of and assistance with prosthetic devices and assistance with self-administration of medications, which includes assistance with wheelchair battery recharging; taking off/ putting on, maintaining and cleaning: prosthesis, braces, corsets, elastic stockings/garments, vision/hearing aids.
  - (1) Assistance with self-administration of medications consists of reminding the recipient to take prescribed and/or over-the-counter medications when they are to be taken and setting up Medi-sets.
  - (2) Factors for consideration of time include, but are not limited to:
    - (A) The extent to which the consumer's is able to manage medications and/or prosthesis independently and safely.
    - (B) The amount of medications prescribed for the consumer.
    - (C) If the consumer requires special preparation to distribute medications (i.e., cutting tablets, putting them into Medi-sets, etc.).
    - (D) If the consumer has cognitive difficulties that contribute to the need for assistance with medications and/or prosthesis.
    - (F) Universal precautions, as appropriate.
  - (3) Exceptions to the time guideline range may include, but are not limited to:
    - (A) If the consumer takes medications several times a day.
    - (B) If the pharmacy sets up medications in bubble wraps or Medi sets for the consumer.
    - (C) If the consumer has multiple prosthetic devices.

(j) Routine menstrual care, is limited to external application of sanitary napkins and positioning for sanitary napkin changes; using and/or disposing of barrier pads; managing clothing; wiping and cleaning; and washing/drying hands.

#### HANDBOOK BEGINS HERE

.1 In assessing menstrual care, it may be necessary to assess additional time in other service categories specified in this Section, such as laundry, dressing, domestic, bathing, and sponge baths.

#### HANDBOOK ENDS HERE

- (1) Factors for consideration of time include, but are not limited to:
  - (A) The extent to which the consumer can assist or perform tasks safely.
  - (B) If the consumer has a menstrual cycle.
  - (C) The duration of the consumer's menstrual cycle.
  - (D) If there are medical issues that necessitate additional time.
  - (E) Universal precautions, as appropriate.
- (2) Exceptions to the time guideline range may include, but are not limited to:
  - (A) The extent to which the consumer is cooperative with the provider in the process.
  - (B) If the consumer has spasticity or locked limbs.
- (k) Ambulation, <u>which includes</u> consisting of assisting the <u>consumer</u> recipient with walking or moving the recipient from place to place <u>inside the home and to/from the front door to the car; climbining or descending stairs; moving and retrieving assistive devices, such as a cane, walker, or wheelchair; etc.</u>
  - (1) Factors for consideration of time include, but are not limited to:
    - (A) The extent to which the consumer can assist or perform tasks safely.

#### SOCIAL SERVICES STANDARDS

Regulations	<b>SERVICE PROGRAM NO. 7:</b>	IN-HOME SUPPORT SERVICES	30-757(Cont.)

#### 30-757 PROGRAM CONTENT SERVICE CATEGORIES AND TIME GUIDELINES 30-757

- (B) The distance the consumer must move inside the home.
- (C) The speed of the consumer's ambulation.
- (D) Any barriers that impede the consumer's ambulation.
- (E) Universal precautions, as appropriate.
- (2) Exceptions to the time guideline range may include, but are not limited to:
  - (A) If the consumer's home is larger or smaller than usual.
  - (B) If the consumer requires frequent help getting to/from the bathroom.
  - (C) If the consumer has a mobility device, such as a wheelchair that results in a decreased need.
  - (D) If the consumer has spasticity or locked limbs.

#### .15 (continued)

#### 30-758 TIME PER TASK AND FREQUENCY GUIDELINES 30-758

- .1 When assessing the need for the services specified in .11 through .15 below in accordance with the provisions of Section 30-763.2, the assessed time shall not exceed the guidelines listed except as provided in .4 below.
  - .11 Domestic services The guideline time for "domestic services" shall not exceed 6.0 hours total per month per household.

#### **HANDBOOK BEGINS HERE**

.111 Tasks included in domestic services are identified in Section 30-757.11.

#### **HANDBOOK ENDS HERE**

12 Laundry -

.121 For laundry services where laundry facilities are available in the home, the quideline time shall not exceed 1.0 hours total per week per household.

#### **SOCIAL SERVICES STANDARDS**

Regulations SERVICE PROGRAM NO. 7: IN-HOME SUPPORT SERVICES 30-758 (Cont

# SOCIAL SERVICES STANDARDS SERVICE PROGRAM NO. 7: IN-HOME SUPPORT SERVICES 30-757(Cont.) Regulations PROGRAM CONTENT SERVICE CATEGORIES AND TIME GUIDELINES 30-757 30-757 30-758 TIME PER TASK FREQUENCY GUIDELINES (Continued) <del>30-758</del> **HANDBOOK BEGINS HERE** In-home laundry service is defined and limited in Section 30-757.135. In assessing time for in-home laundry services, it is expected that the provider will accomplish other tasks while clothes are washing and drying. HANDBOOK ENDS HERE .122 For laundry services where laundry facilities are not available in the home, the guideline time shall not exceed 1.5 hours total per week per household. HANDBOOK BEGINS HERE Out-of-home laundry service is defined and limited in Section 30-<del>757.135.</del> It is expected that the typical provider will use a local laundromat during

(b) It is expected that the typical provider will use a local laundromat during nonpeak hour time and will utilize as many machines simultaneously as necessary for efficient time utilization.

#### HANDBOOK ENDS HERE

.13 Food Shopping - The guideline time for "food shopping" shall not exceed 1.0 hour total per week per household.

#### **HANDBOOK BEGINS HERE**

.131 Food shopping is defined and limited in Section 30-757.136.

#### **HANDBOOK ENDS HERE**

.14 Other shopping errands - The guideline time for "other shopping/errands" shall not exceed 0.5 hours total per week per household.

#### SOCIAL SERVICES STANDARDS

SERVICE PROGRAM NO. 7: IN-HOME SUPPORT SERVICES

30-757(Cont.)

30-757 PROGRAM CONTENT SERVICE CATEGORIES AND TIME GUIDELINES 30-757

# SOCIAL SERVICES STANDARDS Regulations SERVICE PROGRAM NO. 7: IN-HOME SUPPORT SERVICES 30-758 (Cont

30-758 TIME PER TASK FREQUENCY GUIDELINES (Continued)

30 - 758

#### HANDBOOK BEGINS HERE

.141 Other shopping/errands is defined and limited in Section 30-757.136.

#### **HANDBOOK ENDS HERE**

- .2 Counties shall have the authority to develop and use time per task and frequency guidelines for other services, except:
  - 21 personal care services, Section 30-757.14.
- 22 meal preparation, Section 30-757.131.
- . 23 meal clean-up, Section 30-757.132.

Regulations

- .24 paramedical services, Section 30-757.19.
- .3 No exceptions to time per task guidelines shall be made due to inefficiency or incompetence of the provider.
- .4 Welfare and Institutions Code Section 12301.2 states: Time per task guidelines can be used only if appropriate in meeting the consumer's particular circumstances. Exceptions to time per task guidelines shall be made when necessary to enable the recipient to establish and maintain an independent living arrangement and/or remain safely in his/her home or abode of his/her own choosing.
  - .41 When an exception to a time per task guideline is made in an consumer case, the reason for the exception shall be documented in the case file.

#### **HANDBOOK BEGINS HERE**

- .411 Documentation of the reason for the exception will provide necessary data to audit the effectiveness of each guideline in terms of:
  - (a) achieving equity in assessments; and
  - (b) evaluating program costs.

#### **HANDBOOK ENDS HERE**

# Interquartiles by Functional Rank

Ambulation						
	Γ			Interq	uartile	
	Mean	Mode	Median	Low	High	
Rank 2	1.22	1.75	1.00	0.56	1.75	
Rank 3	1.53	1.75	1.40	0.93	1.75	
Rank 4	2.27	1.75	1.75	1.50	2.92	
Rank 5	2.43	1.75	1.75	1.40	3.36	
All Cases	1.73	1.75	1.75	1.00	2.24	

Transfer						
	Γ			Interq	uartile	
	Mean	Median	Mode	Low	High	
Rank 2	0.81	0.58	0.50	0.46	1.12	
Rank 3	0.97	0.82	1.17	0.47	1.17	
Rank 4	1.75	1.40	1.17	0.93	2.30	
Rank 5	2.20	1.75	3.50	1.12	2.80	
All Cases	1.17	0.93	1.17	0.56	1.40	

Repositioning and Rubbing Skin							
				Interquartile			
	Mean	Mode	Median	Low	High		
All Cases	1.80	1.17	1.17	0.58	2.11		

There is no Functional Ranking for <u>Repositioning and Rubbing Skin</u>. It includes range of motion exercises and getting into and out of vehicles.

Bowel and Bladder							
			Interq	uartile			
	Mean	Mode	Median	Low	High		
Rank 2	0.29	N/A	0.29	0.50	1.75		
Rank 3	2.15	1.75	1.75	1.00	2.68		
Rank 4	4.20	3.50	3.50	2.45	5.25		
Rank 5	5.77	7.00	5.25	3.50	7.00		
All Cases	2.93	3.50	2.33	1.17	3.70		

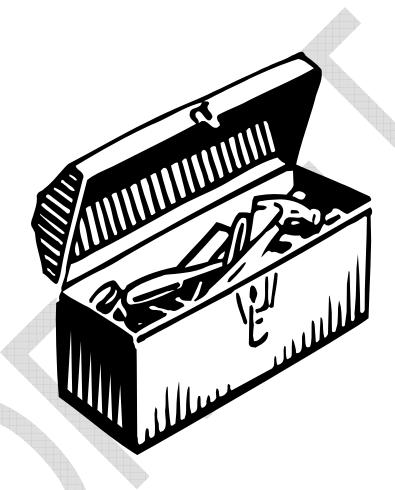
Menstural Care							
	_			Interq	uartile		
	Mean	Mode	Median	Low	High		
All Cases	0.53	0.50	0.40	0.17	0.48		

There is no Functional Ranking for Menstrual Care.

Care and Assistance with Prosthesis					
Interquartile					uartile
	Mean	Low	High		
All Cases	0.77	0.70	0.58	0.35	1.00

There is no Functional Rank for <u>Care and Assistance with</u> <u>Prosthesis</u>. It includes assistance with self-administration of medications.

# CALIFORNIA DEPARTMENT OF SOCIAL SERVICES HOURLY TASK GUIDELINES TASK TOOLS



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> > November 2005

#### **MEAL PREPARATION (COOKING)**

#### **Definition of the Task**

Preparation of meals includes such tasks as planning menus; removing food from refrigerator or pantry; washing/drying hands before and after meal preparation, washing, peeling, and slicing vegetables; opening packages, cans, and bags, measuring, mixing ingredients; lifting pots and pans; reheating food, cooking and safely operating stove, setting the table and serving the meals; and cutting the food into bite-size pieces.

Range	

#### Things to consider for all:

- What can the consumer do safely?
- What does the consumer usually eats for breakfast, lunch, dinner and snacks?
- Would the consumer prefer to eat other types of meals (i.e., more hot meals)?
- What meal preparation tasks can the consumer do safely?
- What does the consumer eat on days provider does not work? (Does the provider prepare food to leave for consumer on days when the provider does not work?)
- How long does it usually take the provider to prepare meals?
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- · Meals must be pureed or cut into bite-sized pieces.
- There are special dietary requirements that call for longer preparation times or preparation of more frequent meals.

#### **MEAL CLEANUP**

#### **Definition of the Task**

**Meal Cleanup:** Washing, rinsing, drying, dishes, pots, pans and utensils; loading and unloading dishwasher; and putting away dishes, pots, pans, and utensils; storing/putting away leftover foods/liquids; and washing/drying hands.

**Note:** This does <u>not</u> include the cleaning of the refrigerator, counters, oven, or stove as these IHSS services are authorized under domestic services.

Range		
	Range	

Things to consider for all:

- What is consumer able to do (Functional Index (FI) ranking)?
   Example: consumer with a FI rank of three (3) can wash breakfast and lunch dishes and utensils, and needs provider to clean up after dinner only.
- Types of meals, i.e. cleanup of breakfast dishes for consumer who has only toast and coffee versus consumer who has eggs and bacon.
- How frequently meal cleanup is performed, i.e. one time per day versus three times per day?
- How often does service need to be provided?
- How often the provider provides services, i.e. seven days per week versus 3 days per week.
- Availability of a dishwasher.
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- Consumer must eat frequent meals which require additional time for preparation and clean up.
- Consumer does not eat breakfast and eats main meal at noon with a light meal for a snack at night which does not require meal cleanup.

#### **BOWEL AND BLADDER CARE**

#### **Definition of the Task**

Assisting a person to and from, on and off toilet or commode; putting on/taking off disposable gloves; wiping and cleaning consumer including the use of toilet paper or other cleaning material; emptying commode; managing clothing and positioning for diaper change; assisting with using, emptying, and cleaning bedpans and bedside commodes, ostomy and/or catheter receptacles, and urinals; application of diapers and disposable barrier pads; and washing/drying both consumer's and provider's hands.

**Note:** This does not include insertion of enemas, catheter, suppositories, digital stimulation as part of a bowel program or colostomy irrigation as these are assessed as paramedical services.

Range	

Things to consider for all:

- What can the consumer do safely?
- Does the consumer have condition which results in frequent urination and/or bowel movements?
- Are there assistive devices (such as elevated toilet seats or Hoyer lifts) available which may result in decreased and/or increased need for assistance?
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- Frequent urination or bowel movements.
- Frequent bowel and/or bladder accidents.
- Consumer has only occasional bowel or bladder accidents which requires assistance.

#### **FEEDING**

#### **Definition of the Task**

Feeding, hydration assistance including reaching for, picking up, grasping utensil and cup; getting food on utensil, bring food, utensil, and cup to mouth; chewing, swallowing food and liquids, manipulating food on plate. Cleaning consumer's face and hands as necessary following a meal; and washing/drying hands before and after feeding.

**Note:** This does not include cutting food into bite-sized pieces or puréeing food as these are assessed as part of meal preparation.

Range	

## Things to consider for all:

- What can the consumer do safely?
- Length of time it takes consumer to eat meals.
- Type of food consumed.
- · Frequency of meals/liquids.
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- Constant presence of provider required due to danger of choking or other medical issues.
- If mentally impaired, consumer may require prompting and/or feeding.
- Frequent meals required.
- Consumer prefers to eat foods that he/she can manage without assistance.
- Consumer must eat in bed.
- Food must be placed in consumer's mouth a special way because the consumer has difficulty swallowing or for other reasons.

#### **ROUTINE BED BATHS**

#### **Definition of the Task**

**Routine Bed Baths:** Obtaining water/supplies, cleaning basin or other materials used for bed baths, and putting them away after bed bath; washing, rinsing; drying body and applying lotion or powder; and washing/drying hands before and after bathing.

**Note:** This does not include sponge baths as this task is assessed as Bathing and Grooming.

Range		

Things to consider for all:

- Is the consumer prevented from bathing in the tub/shower?
- Are bed baths needed in addition to baths in tub/shower?
- · Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- Consumer is confined to bed and sweats requiring frequent bed baths.
- Consumer is unable to cooperate with process.
- · Consumer has locked limbs or spasticity.

#### **DRESSING**

#### **Definition of the Task**

**Dressing:** Putting on/taking off, fastening/unfastening, buttoning/unbuttoning, zipping/unzipping, and tying/untying of garments and undergarments; changing soiled clothing, bringing assistive tools to consumer for independent dressing, and washing/drying hands.

Range		

#### Things to consider for all:

- What can the consumer can do safely?
- What type of clothing does the consumer wear?
- Would consumer prefer other types of clothing?
- How consumer gets dressed when provider not available.
- Weather conditions.
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- The consumer frequently leaves his/her home.
- The consumer soils clothing requiring frequent changes of clothing.
- The consumer has spasticity or locked limbs.

#### **MENSTRUAL CARE**

#### **Definition of the Task**

Menstrual care includes the external application of a sanitary napkin, positioning of the consumer in bed/toilet for sanitary napkin change, using and/or disposing of barrier pads, managing clothing, wiping and cleaning of the consumer including the use of toilet paper and other cleaning materials, wiping off blood from toilet seat, and washing/drying hands.

**Note:** Consideration should also be given when assessing the need for menstrual care, appropriate questions should be asked to determine whether additional time should be assessed for other tasks such as laundry, dressing, domestic (linen changes). Also to be considered is whether additional time is needed for bathing, sponge baths, etc.

	Menstrual Care
Range	

#### Things to consider for all:

- What can the consumer do safely?
- Does the consumer have a menstrual cycle?
- How long does the cycle last?
- Are there medical issues that necessitate additional time?
- Additional cleanup necessary which is not included in other task.
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- Consumer is not compliant or cooperative.
- Consumer has spasticity or locked limbs.

#### **AMBULATION**

#### **Definition of the Task**

**Ambulation:** Assisting a person with walking or moving from place to place inside the home, to/from the front door to car; climbing or descending stairs, moving/retrieving assistive devices such as a cane, walker, or wheelchair to consumer; assisting with movement using a cane, walker, wheelchair or other assistive devices.

Range	

#### Things to consider for all:

- What consumer can do safely?
- Distance consumer must travel when moving inside house.
- Speed of ambulation.
- Barriers that impede ambulation.
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- Consumer lives in a very small one-room apartment.
- Consumer requires frequent help getting to and from bathroom.
- Mobility device such as wheelchair results in decreased need for assistance.
- Consumer has spasticity or locked limbs.
- Consumer lives in a large home.

#### MOVING IN AND OUT OF BED

# Moving In/Out of Bed: Assisting in transfer to/or from bed, chair, or couch to a wheelchair, or walker, or other assistive device, or to a standing position Range

### Things to consider for all:

- What the consumer can do safely?
- Amount of assistance required.
- Availability of equipment such as Hoyer Lift
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- The consumer gets in and out of bed frequently during the day or night for naps or to use bathroom.
- · Weight of consumer.
- The consumer is large and/or has very weak bones which require the consumer to be transferred carefully and slowly, more than an average person with a disability.
- · Consumer has spasticity or locked limbs.

#### **BATHING AND GROOMING**

#### **Definition of the Task**

#### **Bathing (Bath/Shower) and Grooming:**

**Bathing** means cleaning the body in a tub, shower, or sponge bath. Includes getting a basin of water, supplies (and putting them away), managing faucets (turning on/off and adjusting water temperature), getting in and out of a tub or shower, reaching the head and body parts for washing, rinsing and drying, applying lotion/powder to maintain healthy skin, applying deodorant, and washing/drying hands.

**Grooming** includes hair combing and brushing; hair trimming when consumer cannot get to barber; shampooing, applying conditioner, and drying hair; oral hygiene (applying toothpaste, brushing teeth, dentures, flossing); shaving and fingernail and toe nail care (in some instances toe nail care is evaluated as a paramedical service), and washing/drying hands.

**Note**: Getting to and from the bathroom is evaluated as mobility inside (Ambulation).

	A CONTRACT OF THE CONTRACT OF
Range	

# Things to consider for all:

- What the consumer can do safely without help.
- Number of times a consumer may need a bath.
- Number of times a consumer takes a bath.
- Does the consumer require assistance in or out of tub or shower?
- Does the consumer need supplies handed to him/her?
- Does the consumer require assistance washing body?
- Does the provider need to walk away and come back to the bathroom?
- Does the consumer require help with drying body?
- Does the consumer require lotion and/or powder after bathing?
- Does the consumer shower in a wheelchair that would require drying after shower is completed?

#### **BATHING AND GROOMING - CONTINUED**

- Is the consumer's hair shampooed separately from bath or shower?
- · Universal precautions when indicated.

**Note:** Time for bathing does <u>not</u> include the time a provider is standing by while a consumer bathes himself/herself unless there is a reason why the provider needs to be physically present.

More or less time may be assessed if: *(Examples of Exceptions)* The examples below are illustrative, and not exhaustive.

- Constant presence of provider required.
- · Weight of the consumer.
- · Consumer has spasticity or locked limbs.
- Roll-in shower available in home.
- · Layout of bathroom.



#### **RUBBING SKIN/REPOSITIONING**

#### **Definition of the Task**

**Rubbing Skin:** Rubbing skin to promote circulation and washing/drying hands.

**Repositioning:** Turning in bed and other types of repositioning. Transferring (assisting) on and off seats and wheelchairs.

**Note:** Also includes range of motion exercises which meet the criteria of MPP 30-757(g). The range below applies to rubbing skin and repositioning only. The time necessary for range of motion exercises should be assessed independently and added to the time assessed for rubbing skin and repositioning.

Range		

#### Things to consider for all:

- Any repositioning required for completion of task if not specified in the task definition (for example, dressing does not include any time for repositioning of a consumer in order to assist a consumer with dressing).
- Is movement while seated or in bed limited?
- Length of time consumer is in seated position or in bed?
- Is there a history of circulatory problems?
- Is the consumer able to reposition in bed or in a seat?
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- Consumer is paraplegic or quadriplegic, has had a stroke or is confined to bed.
- Consumer has spasticity or locked limbs.

#### CARE AND ASSISTANCE WITH PROSTHESIS

#### **Definition of the Task**

Care and Assistance with Prosthesis: Assistance with taking off, putting on, maintaining, and cleaning prosthesis, braces, corsets, elastic stockings/garments, vision and hearing aids, and washing/drying hands.

Also includes assistance with the self-administration of medications includes reminding the consumer to take prescribed and/or over-the-counter medications when they are to be taken, setting up Medi-sets and distributing medications.

Range		

#### Things to consider for all:

- Consumer's ability to manage medications and/or prosthesis independently and safely.
- Number of medications prescribed.
- Does the consumer need tablets crushed or require special preparation to distribute medications i.e., cutting tablets?
- Does the consumer have cognitive difficulties which contribute to need for assistance with medications and/or prosthesis?
- Universal precautions when indicated.

More or less time may be assessed if: (Examples of Exceptions)

- · Consumer takes multiple medications
- Pharmacy sets up medications for consumer.
- Consumer's household make-up (i.e., requiring childproof caps that the consumer cannot open).
- Consumer has multiple prosthetic devices.